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WEEKLY ROUNDUP OF WORLD PRODUCTION AND TRADE

WR-49-81

WASHINGTON, Dec. 9--The Foreign Agricultural Service of the U.S. Department of Agriculture today announced the following recent developments in world agriculture and trade.

GRAIN AND FEED

In the PHILIPPINES, significant crop damage was sustained by the rice and sugarcane crops when Typhoon Irma crossed the island of Luzon in late November packing winds of over 150 miles per hour. Early assessments suggested about a 70,000-ton loss to the rice crop, but no assessment of the sugarcane crop damage is available at this time, according to recent reports by the U.S. agricultural attache in Manila. About 5 percent of the total Philippine sugarcane crop is produced in the typhoon-affected area. The next USDA estimate of the Philippine rice crop, to be released Dec. 10, will take into account the typhoon damage.

ITALY's corn crop is estimated by the U.S. agricultural counselor in Rome to be about 20 percent above last year's crop of 6.4 million tons. This record crop is the result of favorable growing conditions and expanded production area in 1981. It could mean a sharp reduction in Italy's corn imports, which last year approximated 3 million tons. The U.S. agricultural counselor reports that farmers planted more corn this year and less wheat in response to poor wheat prices. Some producers who normally green chop their corn crop brought their crop to maturity for grain, helping boost harvested area to over 1 million hectares, about 10 percent over the 1980 level of 939,000 hectares. Wheat production is expected to decline roughly 5 to 7 percent from last year's level of 9.15 million tons. Yields were improved because of expanded irrigation capacity.

In BANGLADESH, high prices and good preseason moisture levels and irrigation supplies point to a very good rice crop for harvest this winter. The U.S. agricultural counselor in Dacca projects this third crop of the year at 2.8 million tons (milled basis), up from 2.6 million last year. The counselor's estimates for the 1981 early summer harvest and fall harvest crops are 3.4 and 7.4 million tons, respectively. This year's early summer and fall crops are down 5 and 10 percent, respectively, from last year's crops. If the winter crop outturn is as expected, the country's total crop will be near the present USDA estimate of 13.5 million tons, about 6 percent below last year's record crop.

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In CANADA, new production records were established this year for wheat, barley, rye and corn, according to <u>Statistics Canada</u>. Wheat production was estimated in late November at 24.5 million tons, 4 percent above the previous record set in 1976. The barley outturn was placed at 13.4 million tons, 2 percent above the prior record and 19 percent over last year. Corn production, estimated at 6.2 million tons, and rye production, 964,000 tons, were up 14 and 59 percent, respectively, from previous records. Rapeseed outturn was estimated at 1.79 million tons and flaxseed at 48,000 tons.

In CANADA, the the government of Alberta's recent commitment to provide 75 percent of the financing for a new grain terminal at Prince Rupert represents a crucial step in the achievement of that country's export goals for the 1980's. The Canadian Wheat Board's plans to increase grain and oilseed exports from the 1981/82 target of 26 million tons to 30 million tons by 1985/86 and to 36 million by 1990/91 are heavily dependent on the contruction of new facilities. By 1985, some 15 million tons of grain are expected to pass through the west coast ports of Vancouver and Prince Rupert, about 60 percent more than the 9.5 million tons handled in 1980/81. Port capacity at Vancouver is planned to reach 11 to 12 million tons.

The remaining capacity needs would be met by the new grain terminal at Prince Rupert. The terminal, estimated to cost Canadian \$260 million, will be designed to handle approximately 3.5 million tons by 1985. Up till now, the record was 1.2 million tons in 1980/81. Though the project has been considered for several years, delays were encountered due to the uncertainty surrounding the federal government's role in the project and the uncertainty of rail capacity to transport grain from the interior to Vancouver and Prince Rupert.

The SOVIET UNION has purchased over 6 million tons of U.S. wheat for delivery during the 1981/82 marketing year (July-June). The current season's sales to the Soviets will be the second largest on record, surpassed only by the 9.5 million tons shipped in 1972/73. Total Soviet wheat imports from all sources this year are projected at a record 18 million tons.

In MOROCCO, severe drought has reduced grain production and farm stocks to very low levels. Thus, the current Moroccan monthly average grain import level of 200,000 tons is expected to increase during the December 1981-July 1982 period. Increased imports and timely delivery of grain from inland ports will be needed to prevent migration from rural areas to cities in search of food.

In EGYPT, the government has dramatically lowered export prices for cotton during the 1981/82 season to encourage larger exports. According to the agricultural attache in Cairo, Egyptian authorities would like to increase cotton exports by more than 50 percent from the approximately 750,000-bale level of 1980/81. Prices were lowered approximately 22 percent on common varieties, such as GIZA 75 F/G, from a value of \$1.30 per pound in November 1980 to \$1.01 per pound in November 1981.

OILSEEDS AND PRODUCTS

U.S. SOYBEAN disappearance (inspections for export, plus National Soybean Processor Association crushings) during the first thirteen weeks of the 1981/82 marketing year, which began Sept. 1, totaled 13.9 million tons-14.9 percent above the same period last year and 2.2 percent above the record large 1979/80 volume. During the week ending Nov. 26, U.S. soybean disappearance amounted to 1.13 million tons--15.1 percent above the same week a year ago. The gain reflected strength in exports, while crushings remained about unchanged. The Sept. 1-Nov. 26 data for specified years are as follows in millions of tons:

	1979/80	1980/81	1981/82
Exports Crushings	6.31 7.24	4.67 7.39	6.43 7.42
Total disappearance	13.55	12.06	13.85

DAIRY, LIVESTOCK AND POULTRY

In the SOVIET UNION, meat production on state and collective farms during January-October continued to average about 2 percent above the corresponding 1980 period. Similar comparisons for egg production indicated a 6-percent increase, while milk production was running about 3 percent below the 1980 level. For individual meats, poultry meat production was 9 percent above the previous year and pork was up 3 percent. However, beef, the most important meat, was up less than 1 percent. Average slaughter weights for cattle and hogs were below long term averages. Monthly production data generally are not available for private farms, which represent an important source of livestock products for the economy as a whole.

Except for hogs, Soviet livestock inventories on Nov. 1 for state and collective farms were above year-earlier levels. Poultry, with a 3-percent increase, showed the largest gain. Cattle and sheep numbers were up less than half of 1 percent while swine inventories were down marginally.

Total Soviet procurements of livestock and poultry meat in the first ten months of 1981 were up slightly more than 1 percent, compared with 1980. Procurements reached 12.9 million tons on a live weight basis from state-controlled farms and 531,000 tons from private farms. Last year, procurements from state-controlled farms during January-October totaled 12.5 million tons, while private farms supplied 733,000 tons.

The decline in procurements from private farms may have resulted from smaller production because of the short feed supply or it may be one of the effects of regulations covering state-controlled farms. State and collective farms now are permitted to purchase privately produced livestock from individuals and to count that production with the state and collective farm output. Such transactions tend to inflate production statistics from state farms, while lowering production totals for the private sector.

CANADA's broiler output in 1981 is expected to show a 2.5-percent gain over 1980, although previous reports indicated a decline. Stronger consumer demand for broilers during the first half of 1981 resulted in the Canadian Chicken Marketing Agency making an upward adjustment in production allocations for the last half of 1981.

Production of eggs in Canada during 1981 also is expected to be above the 1980 level, while previous forecasts showed production below last year. The change may have been made to take advantage of smaller egg production and higher egg prices in the United States. The downward trend in U.S. production may continue at least through mid-1982. For the first nine months of 1981, Canadian shell egg exports to the United States were 4 percent above the 1980 level.

In IRAQ, the State Organization for Animal Production reportedly has signed a contract with two contractors based in the United Kingdom for a \$19 million turn-key poultry breeding project. Specifically, the contract is for the design, supply, construction and commissioning of a poultry stock production facility at Samarrach, 120 kilometers north of Baghdad. The project will include six farms, a hatchery, water purification plant, administration buildings and roads. When completed, the facility is designed to produce 1.6 million chickens a year for use as parent stock for production of broiler chickens.

This and other medium to large-scale poultry projects represent the second major phase in a plan to expand Iraq's poultry production. Thus far, however, the country has been unable to achieve self-sufficiency objectives. Consequently, Iraq plans to import 130,000 tons of dressed chickens and 1 billion table eggs in 1982 to meet local demand. Iraq recently recieved bids on tenders for these amounts.

TOBACCO

ZIMBABWE's 1981 flue-cured tobacco crop was one of the most profitable in its history. According to the Tobacco Marketing Board, the total flue-cured tobacco crop was valued at Zimbabwe \$123.8 million (U.S. \$173.3 million), an increase of 71 percent over last year's disappointing results. The average price was Zimbabwe \$1.84 per kilogram (U.S. \$2.57 per kilogram), compared with Zimbabwe 79 cents per kilogram (U.S. \$1.10 per kilogram) in 1980.

The quantity of tobacco sold during the 1981 season was 67,400 tons, which was slightly below the marketing quota of 70,000 tons. The Zimbabwe Tobacco Association has set a target of 96,000 tons for the 1982 crop. However, through special provisions in the quota scheme, production for 1982 could be over 100,000 tons. The target for 1983 is expected to be set at around 105,000 tons.

The shift in plantings from tobacco to corn in 1981 contributed to a drop in jobs in rural areas. The increase in quota for the 1982 crop has induced many farmers back into the business, thus creating more jobs in the countryside. Grower registrations with the Zimbabwe Tobacco Association have increased 14 percent.

With this year's lucrative sales, tobacco is again expected to become the country's principal export crop. Exports of the 1981 crop and stocks held from last year's crop are expected to earn Zimbabwe \$220 million (US\$308 million). Europe will be the largest market, taking close to half of the crop. Stocks are expected to be down to 50,000 tons by the beginning of next year's tobacco auctions.

The transport of crop inputs, particularly coal, remains a problem. A crop of 100,000 tons will require deliveries of 192,000 tons of coal for curing. However, railway officials indicate that the coal requirement can be met. The transport of tobacco to ports in South Africa and Mozambique is of less concern, since railway officials are giving tobacco top priority. Since tobacco is a high-value, low-bulk crop, it earns nearly four times more than corn for each car exported.

BRAZIL's tobacco growers and industry representatives have agreed on increases of 125 to 140 percent in producer prices for the 1982 tobacco crop. The higher prices are expected to stimulate production needed to rebuild stocks and fill higher export demand. The 1982 average grower's prices for Virginia flue-cured and burley per kilogram are estimated at CR \$192 to \$195 (US \$1.88 to \$1.91) and CR \$173 to \$178 (US \$1.69 to \$1.74), respectively.

While Brazil's current crop was of very good quality, total production was less than the preceding year. Burley supplies are short worldwide and demand is strong for Brazilian leaf. China's purchases of Brazilian leaf amounted to 3,000 to 4,000 tons this year, which might have been greater if stocks had been available. Production of Virginia flue-cured and burley are projected to increase 14 and 29 percent, respectively, in 1982.

Brazil's tobacco companies exercise strict control over the cultural practices of growers in order to improve quality while ensuring competitive export pricing. With the larger crop expected in 1982, exports are estimated at 145,000 tons.

The INTERNATIONAL COFFEE ORGANIZATION'S initial export quotas for member exporting countries for the second quarter (January-March 1982) of the 1981/82 coffee year were set at 14 million bags because the fifteen-day moving average of the Composite Indicator Price was above US \$1.20 per pound at \$1.2426 on Dec. 1. An increase of one million bags for the quarter could occur if the fifteen-day moving average indicator price rises to US \$1.40, or it could be cut by one million bags if the indicator price falls to U.S. \$1.20 per pound.

In COLOMBIA, coffee plant breeders recently announced development of a new, highly rust resistant coffee variety called "Colombia." The new variety is a cross between a highly rust-resistant variety from the island of Timor in Indonesia and Latin America's popular, high yielding Caturra variety. "Colombia" has the important characteristics of a high level of resistance to yield-reducing rust, as well as the good palatable characteristics of Caturra.

The Colombian Coffee Federation, which sponsored the 13 years of research leading to the Colombia variety, hopes to make seeds and plants available to growers by midto late 1982 for commercial planting. The Colombia variety will help protect that country's vital coffee industry, if an outbreak of rust were to occur. In other Latin American countries where rust is an ever increasing problem, the Colombia variety opffers significant potential in fighting the spread of rust disease.

SRI LANKA recently reduced its export duty on tea in an effort to improve the competitive position of Sri Lankan teas in world markets. Effective Nov. 12, the duty on bulk tea was lowered from 10.50 rupees to 8.00 rupees per kilogram and on packaged tea from 8.50 rupees to 6.50 rupees per kilogram. F.o.b. prices for tea--which remained reasonably stable during 1980 and the first half of 1981 at around US \$2.00 per kilogram--fell nearly 25 percent in recent months and currently are just above US \$1.50 per kilogram. This slump in international prices has jeopardized the viability of Sri Lanka's tea industry, despite a depreciation in the exchange rate which has enhanced rupee earnings.

The export duty on tea bags and instant tea is being maintained at the existing rate of 1.00 rupee per kilogram and 13.50 rupees per kilogram, respectively.

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TRADE DEVELOPMENTS

MEXICO's National Railway recently announced two significant increases in domestic rail freight rates which may eventually encourage a shift from rail to ocean transport for future imports, although their total impact is still not known. The first increase, which became effective Dec. 7, boosted freight rates for shipments moving from the border points of both Presido and El Paso to Mexico City. The change, announced at the U.S.-Mexican agricultural transportation meeting in New Orleans in early December, was made to more accurately reflect cost relationships and to reduce indirect subsidies. Equalization of rates from many border points was initiated last year to expedite rail transportation during the period of increased grain exports from the United States to Mexico. The second change will be a 25-percent across-the-board increase for all freight rates effective Dec. 15.

AGRICULTURAL IMPORTS

U.S. agricultural imports for October were valued at \$1.46 billion, a slight rise over last October's \$1.42 billion, as gains for sugar, cocoa, rubber, and fresh fruits and vegetables more than offset declines in coffee and livestock and meats.

Sugar and tropical product imports rose 9 percent above last year's level due primarily to significant increases in sugar, cocoa, and rubber, which more than compensated for a substantial decline in coffee imports. Sugar, second only to coffee as the largest U.S. agricultural import, rose 36 percent in value in October. This increase was the result of an Ill-percent rise in the quantity imported, much of which can be attributed to a 35-percent drop in imported sugar prices since October 1980. Likewise, the 20- and 71-percent increases in the value of cocoa and rubber imports stemmed largely from higher import volumes, stimulated by 24- and 22-percent decreases in import prices. Coffee imports were down in October to \$229 million, a 17-percent decline from October 1980. Lower coffee prices more than offset the rise in U.S. import demand.

Horticultural product imports were up 17 percent over October 1980, largely the result of a 54-percent increase in the value of fresh fruit and fruit product imports, including juices. Bananas, which alone account for 82 percent of all fresh fruit imports, rose 45 percent in value, spurred on by increased U.S. demand and higher prices.

Livestock and products, which accounted for over 17 percent of total U.S. agricultural imports, declined 19 percent in value, thus restraining the overall rise in October's import figures. Much of this decline is due to smaller meat imports, especially beef and veal. Lower domestic prices and increased availabilities of U.S. beef are chiefly responsible for the decline.

U.S. AGRICULTURAL IMPORTS FROM ALL SOURCES OCTOBER 1980 - OCTOBER 1981

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U.S. AGRICULTURAL IMPORTS FROM ALL SOURCES OCTOBER 1980 - OCTOBER 1981

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MT: 29,370 32,786 +12 25,245 30,247 +20 29,370 32,780 +12 25,28 LIT: 66,718 136,274 +104 12,316 28,732 +133 66,718 136,274 +104 12,35 MT: 43,693 35,730 -18 14,435 11,447 -21 43,693 35,730 -18 14,44 12,3410 25,684 +11 20,241 29,053 +44 23,110 25,684 +11 20,241 29,053 +44 23,110 23,726 +11 20,241 29,053 +44 23,110 23,726 +11 47,692 59,031 +23 34,212 38,214 +12 47,892 59,031 +23 34,212 38,214 +12 47,892 59,031 +23 25,705 19,899 -23 47,892 59,031 +23 34,212 38,214 +12 47,892 59,031 +23 25,705 19,899 +11 10,599 +11 10,59	FRESH		197,661	0	CVI	8,63	8,34	5	93,66	45,99	CI	8,63	8,34	+
LIT: 66,718 136,274 +104 12,316 28,732 +133 66,718 136,274 +104 12,53 MT: 43,693 35,730 -18 14,435 11,447 -21 43,693 35,730 -18 14,94 MT: 20,241 29,053 44 23,100 25,684 +11 20,241 29,053 +44 23,10 XXX: 21,316 23,726 +11 20,241 29,053 +44 23,11 LIT: 47,692 59,031 +23 34,412 38,214 +12 47,892 59,031 +23 34,92 XXX: 25,705 19,899 -23 47,892 59,031 +23 35,705 XXX: 15,396 +11 10,699 +11 10,699 +11	PREP. & PRES	 F	29,370	(C)	-	5,24	0,24	S	9,37	32,78	-	5 . 2	\$ 5	+2
MT: 20,241 29,053 +44 23,100 25,684 +11 20,241 29,053 +44 23,100 25,684 +11 20,241 29,053 +44 23,100 25,684 +11 20,241 29,053 +44 23,100 25,726 +11 20,241 29,053 +44 23,100 25,726 +11 20,241 29,053 +44 23,100 25,726 +11 20,241 29,053 +44 23,100 25,726 +11 20,241 29,053 +44 23,100 25,726 +11 20,241 20,051 +12 47,692 59,031 +23 34,212 34,	JUICES	LIT:	66,718	-	0	2,31	8,73	3	6,71	36,27	0	2,31	8,73	+1
XXX: 20,241 29,053 +44 23,100 25,684 +11 20,241 29,053 +44 23,1 XXX: 21,306 23,726 +11 20,241 29,053 +44 23,1 ZXXX: 25,088 41,784 +19 69,870 75,600 +8 35,088 41,784 +19 69,8 XXX: 25,726 +12 47,892 59,031 +23 34,2 XXX: 25,705 19,899 -23 47,892 59,031 +23 34,2 XXX: 15,356 17,699 +11	VEGETABLES, FR/FZ	MT	43,693	M	T	4943	1,44	CV	3,69	5 + 73	-	4043	1044	1
XXX: XXX: 21,306 22,3726 +11 LIT: 35,088 41,784 +19 69,870 75,600 +8 35,088 41,784 +19 69,88 LIT: 47,692 59,031 +23 34,212 38,214 +12 47,892 59,031 +23 34,2 XXX: XXX: 15,396 17,699 +11	VEG., PREP., PRES	 LÆ	20,241	.0	7	3,10	2,68	\leftarrow	0.24	60.6	#	3,10	5,68	+
: LIT: 35,088 41,784 +19 69,870 75,600 +8 35,088 41,784 +19 69,8 : LIT: 47,692 59,031 +23 34,212 38,214 +12 47,892 59,031 +23 34,92 : XXX: 25,705 19,899 -23 47,892 59,031 +23 25,7 : XXX: 15,396 17,099 +11	TREE NUTS	*XXX				1,30	3,72	-				1,30	3,72	+
•: LIT: 47,692 59,031 +23 34,212 38,214 +12 47,892 59,031 +23 34,92 •: XXX: •: XXX: •: XXX: •: XXX: •: XXX: •: XXX:		LIT:	5,08	8	-	9,87	5,60	+8	5,08	1,78	-	9.87	5,60	*
RODUCIS XXX: 25,705 19,899 -23 25,705 15,396 17,099 +11 15,396 17,099 +11 15,396 17,099 +11	OTHER ALCOHOLIC BEV.:	LIT:	7,69	M	OI	4,21	8,21	-	7,89	9,03	N	4,21	8,21	+1
15,396 +11		** × ×				5,70	9,89	S				5,70	6846	1
		:×××				5,39	6061	4-4				5,39	1,09	+
TOTAL XXX: 280.912 328.998 +17 280.21	TOTAL	>	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	10.30	1 7 1 2 1	1 -				0 0 0	X X X X X X X X X X	+

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U.S. AGRICULTURAL IMPORTS FROM ALL SOURCES OCTOBER 1981 - OCTOBER 1981

				CUMULATIVE TO DATE				CURRENT	O THROW	COCTOBER	R .	
COMMODITIES	UNIT	QUANTITY	ITY	VALUE	UE	•••	QUANTITY	ТІТҮ		A >	VALUE	
•••		10/80-10/80:1	:10/80-10/80:10/81-10/81:01F	:10/80-1u/80:10/81-16/81:DIF	10/81-10/81:	DIF :	1980	1981	:DIF :	1980	: 1981	:DIF
SUGAR & TROP. PRODS.												
SUGAR, RAW & REFINED:	TW	285,976			235,166	+36	285,976	602,190		172,506	235,166	+36
SWEETENERS	MT	27,966	40,350 +44		18,680	+21	27,966	40,350	+44	15,454	18,580	+21
COCOA & PRODUCTS	HT	25,132			79,572	+20	25,132	40,284		66,220	79,572	+20
COFFEE	MT	80,940			229,499	-17	80,940	92,872		276,999	229,499	-17
ESSENTIAL OILS	T M	544			7,501	-27	544	562		10,280	7,501	-27
TEA	HT	69473			12,256	+16	6,473	7,192		10,551	12,256	+16
SPICES	MT	11,206			11,693	-21	11,206	9,181		14,728	11,693	-21
FIBERS	MT	5,107			5,544	+39	5,167	6,985		3,998	5,544	+39
RUBBER & ALLIED GUMS:	FMT	32,738			73,350	+71	32,738	767,07		42,775	73,350	+71
OTHER	XXX			11,932	9,314	-16				11,032	9,314	-16
TOTAL XXX	XXX			624,543	682,574	6+				624,543	682,574	6+1
GRAND TOTAL XXX:	XXX			1,423,934	1,455,294	+2				1423,934	1 2	+ 1

VALUE UNITS ARE IN THOUSANDS OF DOLLARS. LITER UNITS ARE IN THOUSANDS OF UNITS. XXX INDICATES QUANTITY TOTALS ARE NOT MEANINGFUL WHERE UNITS OF MEASURE DIFFER. --- INDICATES CHANGE LESS THAN 1 PERCENT. NOTE:

1/ INCLUDES BY-PRODUCTS.

SOURCE: U.S. CENSUS DATA (UNADJUSTED).

TRADE AND ECONOMIC INFORMATION DIVISION TRADE AND MARKETING BRANCH, IAS, FAS, USDA

Rotterdam Prices and E.C. Import Levies:

Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam, the Netherlands, compared with a week earlier and a year ago:

Item Dec.	8, 1981	: Change fro : previous we	
\$ per m. ton	\$ per bu.	¢ per	\$ per m. ton
Canadian No. 1 CWRS-13.5%227.00 U.S. No. 2 DNS/NS: 14%202.00 U.S. No. 2 DHW/HW: 13.5%209.00 U.S. No. 2 S.R.W187.00 U.S. No. 3 H.A.D199.00 7/ Canadian No. 1 A: Durum220.00 7/	6.18 5.50 5.69 5.09 5.42 7/ 5.99 7/	0 -11 -11 0 -2 <u>7/</u> -1 <u>7/</u>	$\frac{1}{228.50}$ 234.00 222.00 282.00 $\frac{1}{2}$
Feed grains: U.S. No. 3 Yellow Corn123.00 U.S. No. 2 Sorghum 2/134.00 Feed Barley 3/149.00	3.12 3.40 3.24	-2 +10 +4	181.75 189.00 <u>1</u> /
Soybeans: U.S. No. 2 Yellow	7.27 7.50 <u>7</u> /	+34 +30 <u>7/</u> +10.00 5	332.50 1/ 300.00
EC Import Levies Wheat 6/	2.21 1.79 2.80 2.52	-12 -2 -1 -6	66.40 45.00 86.05 62.55

^{1/} Not available.

Note: Basis Jan. delivery.

^{2/} Optional delivery: U.S. or Argentine Granifero Sorghum.

^{3/} Optional delivery: U.S. or Canadian Feed Barley.

^{4/} Optional delivery: Brazil yellow.

^{5/} Dollars per metric ton.

^{6/} Durum has a special levy.

^{7/} April/May delivery

UNITED STATES DEPARTMENT OF AGRICULTURE WASHINGTON, D.C. 20250

OFFICIAL BUSINESS
PENALTY FOR PRIVATE USE, \$300

POSTAGE AND FEES PAID
U.S. DEPARTMENT OF
AGRICULTURE



AGR 101 FIRST CLASS